



Filing ID #10023383

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Ben McAdams
Status: Congressional Candidate
State/District: UT04

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2018
Filing Date: 05/16/2018

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Citibank Checking [BA]	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
Fairmont Holdings LLC - Salt Lake rental 2 [RP]	SP	\$100,001 - \$250,000	Rent	\$5,001 - \$15,000	\$5,001 - \$15,000
LOCATION: SALT LAKE CITY, UT, US					
Retirement ⇒ ABF LG CAP VAL INST [MF]		\$1,001 - \$15,000	Tax-Deferred		
Retirement ⇒ ABF LG CAP VAL INST [MF]		\$1,001 - \$15,000	Tax-Deferred		
Retirement ⇒ ABF LG CAP VAL INST [MF]		\$1,001 - \$15,000	Tax-Deferred		
Retirement ⇒ AF EUROPAC GROWTH R6 [MF]		\$1,001 - \$15,000	Tax-Deferred		
Retirement ⇒ Apple Inc. (AAPL) [ST]		\$50,001 - \$100,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Retirement ⇒ FID 500 INDEX INST [MF]		\$1,001 - \$15,000	Tax-Deferred		
Retirement ⇒ FID 500 INDEX INST [MF]		\$1,001 - \$15,000	Tax-Deferred		
Retirement ⇒ FID 500 INDEX INST [MF]		\$50,001 - \$100,000	Tax-Deferred		
Retirement ⇒ FID 500 INDEX INST [MF]		\$1,001 - \$15,000	Tax-Deferred		
Retirement ⇒ FID DIVERSIFD INTL K [MF]		\$15,001 - \$50,000	Tax-Deferred		
Retirement ⇒ FID FREEDOM 2040 K [MF]		\$15,001 - \$50,000	Tax-Deferred		
Retirement ⇒ FID FREEDOM 2040 K [MF]		\$50,001 - \$100,000	Tax-Deferred		
Retirement ⇒ FID FREEDOM 2045 K [MF]		\$1,001 - \$15,000	Tax-Deferred		
Retirement ⇒ FID FREEDOM 2045 K [MF]		\$1,001 - \$15,000	Tax-Deferred		
Retirement ⇒ FID INFLAT PROT BOND [MF]		\$1,001 - \$15,000	Tax-Deferred		
Retirement ⇒ FID INFLAT PROT BOND [MF]		\$1,001 - \$15,000	Tax-Deferred		
Retirement ⇒ FID INTL INDEX PR [MF]		\$1,001 - \$15,000	Tax-Deferred		
Retirement ⇒ FID INTL INDEX PR [MF]		\$1,001 - \$15,000	Tax-Deferred		
Retirement ⇒ FID SMALL CAP GROWTH [MF]		\$1,001 - \$15,000	Tax-Deferred		
Retirement ⇒ FID SMALL CAP GROWTH [MF]		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Retirement ⇒ FID US BOND IDX PR [MF]		\$1,001 - \$15,000	Tax-Deferred		
Retirement ⇒ FID US BOND IDX PR [MF]		\$1,001 - \$15,000	Tax-Deferred		
Retirement ⇒ Fidelity Cash Reserves IRA [IH]		\$1,001 - \$15,000	Tax-Deferred		
Retirement ⇒ Fidelity Commodity Strategies Fund CL S [MF]		\$1,001 - \$15,000	Tax-Deferred		
Retirement ⇒ Fidelity Emerging Markets Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		
Retirement ⇒ Fidelity Freedom 2040 K [MF]		\$50,001 - \$100,000	Tax-Deferred		
Retirement ⇒ Fidelity Freedom 2045 K [MF]		\$1,001 - \$15,000	Tax-Deferred		
Retirement ⇒ Fidelity Global Equity Class S [MF]		\$15,001 - \$50,000	Tax-Deferred		
Retirement ⇒ Fidelity Global Infrastructure CL S [MF]		\$15,001 - \$50,000	Tax-Deferred		
Retirement ⇒ Fidelity Global Opportunities Credit Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		
Retirement ⇒ Fidelity Global Real Estate Securities S [MF]		\$1,001 - \$15,000	Tax-Deferred		
Retirement ⇒ Fidelity Inflat Prot Bond [MF]		\$1,001 - \$15,000	Tax-Deferred		
Retirement ⇒ Fidelity International Developed Market Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		
Retirement ⇒ Fidelity Intl Index Pr [MF]		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Retirement ⇒ Fidelity iShares Core S&P 500 [MF]		\$15,001 - \$50,000	Tax-Deferred		
Retirement ⇒ Fidelity Russell Inv Multi Asset Grow Strat S [MF]		\$1,001 - \$15,000	Tax-Deferred		
Retirement ⇒ Fidelity Small Cap Growth [MF]		\$1,001 - \$15,000	Tax-Deferred		
Retirement ⇒ Fidelity Strategic Bond Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		
Retirement ⇒ Fidelity US Small Cap Equity Class S [MF]		\$1,001 - \$15,000	Tax-Deferred		
Retirement ⇒ Fidelity US Strategic Equity [MF]		\$15,001 - \$50,000	Tax-Deferred		
Retirement ⇒ Main Street All Cap Fund A [MF]		\$1,001 - \$15,000	Tax-Deferred		
Retirement ⇒ Oppenheimer Funds Capital Appreciation [MF]		\$1,001 - \$15,000	Tax-Deferred		
Retirement ⇒ PIM TOTAL RT INST [MF]		\$1,001 - \$15,000	Tax-Deferred		
Retirement ⇒ PIM TOTAL RT INST [MF]		\$1,001 - \$15,000	Tax-Deferred		
Retirement ⇒ PIM TOTAL RT INST [MF]		\$1,001 - \$15,000	Tax-Deferred		
Retirement ⇒ Russell Inv Unconstr Total Return Class S [MF]		\$1,001 - \$15,000	Tax-Deferred		
Retirement ⇒ SS US BOND INDEX II [MF]		\$1,001 - \$15,000	Tax-Deferred		
Retirement ⇒ State of Utah Pension [PE]		\$15,001 - \$50,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Retirement ⇒ URS BOND FUND [MF]		\$1,001 - \$15,000	Tax-Deferred		
Retirement ⇒ URS BOND FUND [MF]		\$50,001 - \$100,000	Tax-Deferred		
Retirement ⇒ URS INTERNATIONAL FUND [MF]		\$1,001 - \$15,000	Tax-Deferred		
Retirement ⇒ URS INTERNATIONAL FUND [MF]		\$50,001 - \$100,000	Tax-Deferred		
Retirement ⇒ URS LARGE CAP GROWTH FUND [MF]		\$50,001 - \$100,000	Tax-Deferred		
Retirement ⇒ URS LARGE CAP GROWTH FUND [MF]		\$1,001 - \$15,000	Tax-Deferred		
Retirement ⇒ URS LARGE CAP VALUE FUND [MF]		\$1,001 - \$15,000	Tax-Deferred		
Retirement ⇒ URS LARGE CAP VALUE FUND [MF]		\$50,001 - \$100,000	Tax-Deferred		
Retirement ⇒ URS SMALL CAP FUND [MF]		\$1,001 - \$15,000	Tax-Deferred		
Retirement ⇒ URS SMALL CAP FUND [MF]		\$50,001 - \$100,000	Tax-Deferred		
Retirement ⇒ VANG REIT INDEX ADM [MF]		\$1,001 - \$15,000	Tax-Deferred		
Retirement ⇒ VANG REIT INDEX ADM [MF]		\$1,001 - \$15,000	Tax-Deferred		
Retirement ⇒ VANG REIT INDEX ADM [MF]		\$1,001 - \$15,000	Tax-Deferred		
Retirement ⇒ VANG SM GR IDX INST [MF]		\$15,001 - \$50,000	Tax-Deferred		
Retirement ⇒		\$15,001 - \$50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
VANGUARD INST INDEX [MF]					
Sugarmont Holdings - Salt Lake rental [RP]	SP	\$100,001 - \$250,000	Rent	\$15,001 - \$50,000	\$15,001 - \$50,000
LOCATION: Salt Lake City, UT, US					
USAA Checking/Savings Account [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Zions bank accounts [BA]	DC	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200

* Asset class details available at the bottom of this form. For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

SCHEDULE C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Salt Lake County	Salary	\$51,003.00	\$143,213.00
University of Utah	Spouse salary	N/A	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Ditech Financial LLC	May 2014	Mortgage on rental property	\$100,001 - \$250,000
	ACS Educational Services	May 2003	Student loan	\$10,000 - \$15,000
	Utah Higher Education Assistance	May 2003	Student loan	\$50,001 - \$100,000
SP	ACS Educational Services	May 2002	Student loan	\$15,001 - \$50,000
JT	Primary Residential	June 2015	Mortgage on rental property	\$100,001 - \$250,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Board Member	Salt Lake Chamber of Commerce/Downtown Alliance
Board Member	Envision Utah

Position	Name of Organization
Board Member	World Trade Center Utah
Board Member	Utah Technology Council
Board Member	United Way of Salt Lake
Board Member	Shelter the Homeless
Board Member	Sundance Utah Advisory Board
Board Member	Utah Community Action
Board Member	Women's Leadership Institute
Board Member	Kem C. Gardner Policy Institute Advisory Board
Board Member	Sorenson Policy Innovation Lab

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
January 2010	Myself and the State of Utah	Pension

SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

- Retirement

EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

Trusts: Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust benefiting you, your spouse, or dependent child?

☐ Yes ☒ No

Exemption: Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or dependent child because they meet all three tests for exemption?

☐ Yes ☒ No

CERTIFICATION AND SIGNATURE

☒ I CERTIFY that the statements I have made on the attached Financial Disclosure Report are true, complete, and correct to the best of my knowledge and belief.

Digitally Signed: Ben McAdams , 05/16/2018